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**Hotel Industry:**

**An Answer to the Emerging Trends on the Global Demand  
Side of Tourism**

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## Abstract

This dissertation studies essentially how Millennials are changing the hotel industry, in the sense that new trends are emerging with this generation and hotels need to respond accordingly, in order to survive within their competitive industry. Emphasis is also given to Asian travellers, as the enlargement of these countries' middle class populations is predicted, therefore making Asian travellers a valuable target for the hotel industry. To successfully target this segment, hoteliers need also to consider the cultural differences and aspirations that come together with the Asian travellers, and appropriately adapt their offer to them.

I will then redirect this study to the city of Lisbon, the Portuguese capital, to analyse if Lisbon's four and five-star hotel managers are aware of the new market trends, and to understand how they are changing their hotels in order to make them more attractive to Millennials and Asian travellers.

Using a sample of 12 hotels (four and five-stars ratings), I have concluded that, although there is a notable undergoing process of adaptation to these guests, there is a long way ahead in order for Lisbon's hotels to entirely please and retain millennial guests.

**Keywords:** Hotel Industry; Emerging Trends; Millennials and Asian travellers; Lisbon

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## Introduction

With the economic landscape improving around the world, people are gradually having a higher disposable income to spend on leisure travel. Consequently, the hotel industry is becoming more competitive over time, and guests are becoming more demanding about obtaining better value for money in their selections.

The success of the hotel industry and its players relies heavily on delivering outstanding customer service, while constantly monitoring and addressing the emerging trends, needs and purchasing behaviour of their potential customers. The purpose of this dissertation is thus to identify and analyse what new global trends are emerging from the demand side of the hotel industry, and to assess how hotels are responding to them.

As ever-changing demographics force businesses to adapt accordingly, this dissertation will focus on the emerging trends that are arising with the advent of the millennial generation, also known as generation Y. This is a technological-demanding generation, which will soon become the main customer base of the hotel industry. Nonetheless, some emphasis will also be given regarding possible trends that travellers coming from emerging Asian countries (e.g. China, India and others) may bring into the industry, as these countries have become relevant sources of outbound tourism.

It is important to mention that, throughout this dissertation, both the trends that are emerging from millennial and Asian travellers, as well as the implementations and adaptations that are being achieved by hotels, are exclusively focused on the following segments: guests who travel for leisure purposes<sup>1</sup>, and hotels categorized within the four and five-stars rating levels.

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<sup>1</sup> Leisure Travel - Travel undertaken for pleasure and unrelated to paid work time

Lastly, there will be a redirection to Portugal, namely to the city of Lisbon, in the interest of understanding to what extent the hotels in the Portuguese capital are prepared, or able, to cater for the needs of this next generation of travel.

## **Literature Review**

### **Millennials**

Generation Y has been given many different labels, including Millennials (or millennial generation), Generation Dot-Com, EchoBoomers, Bridgers, NeXters, Net Generation, First Digitals, Trophy Generation and C-Generation (Ballone, 2007; Cetron and Davies, 2008; Fenich et al., 2011).

Besides the inconsistency that goes around as to how this generation is named, there is also some discrepancy regarding which birth years it encompasses. However, most researchers would agree that this generation includes people born anywhere between the years of 1979 and 2000 (McBeath, 2009).

Regardless of which years are used, Millennials are the biggest generational group since the Baby Boomers (people born between 1946 and 1964), representing 25.47 per cent of the world's total population (Smith, 2010; Puybaraud et al., 2010).

### **The Hotel Industry and Millennial Guests**

With the growth of the services sector across the globe, customers have become more experienced, sophisticated and demanding (Hammond, 2004). This is particularly true for the hotel industry, as nowadays' hotel guests are better travelled than previous generations and have a better perception of what 'good service' means. Thus, improving service quality has become the centrepiece of corporate strategy to attract and keep customers (Dirks, 2004; Woods and King, 2010).

Over the past decades, the hotel industry has given significant attention to the Baby Boomer generation. However, changes in demographics require the hotel

industry to shift their attention to the preferences and choices of millennial travellers. This is an enthusiastic generation, with a sense of adventure, which aspires to see the world and experience the best travel opportunities possible (Hein, 2015).

It is expected that, by 2020 or sooner, Millennials might lead the travel demographics, since “this generation is here and growing, with an immense travel spending potential” (Lee, 2014). Therefore, it is important for hoteliers to understand what these millennial guests really want, and to be prepared to adapt their product and services offerings to meet their needs and expectations (Watkins, 2015). Otherwise, hoteliers may observe a decrease in millennial guests, as people from this generation have a tendency to walk away from anything that they do not find personally beneficial (Jones, 2007; Kovaleski, 2008; Schmitt, 2009).

### **The Hotel Industry and Asian Guests**

With the demographic and economic development, alongside with the ease on outbound travel restrictions, the Asian region has gained the world’s attention as a tourism generator (Li, Meng and Uysal, 2008).

As countries from this region gain importance as tourism outbound source markets, it is important for hoteliers to understand key differences between Asian and western cultural values, as cultural values are an influential driver in identifying and determining consumer preferences (Li, Meng and Uysal, 2008).

The influence of cultural values on behaviours, such as different expectations and preferences, has been supported by many studies in the past (e.g. Armstrong, Mok, Go, and Chan, 1997; Hofstede, 1980). Therefore, it is important for hoteliers to gain sound knowledge about these cultural differences in order to provide a quality service that can meet their customer expectations.

## **Methodology**

The writing content of this dissertation involves two distinct types of data collection: primary data and secondary data.

As secondary research, the opinions of hospitality industry experts (e.g. Teresa Y. Lee; Michael Fishbin from EY and more) were mainly used to determine what the already recognized characteristics of the millennial generation are, and the trends that are emerging with this generation's guests, as regards the hotel industry.

As primary research, a survey was conducted and managers from 12 distinct hotels in Lisbon were interviewed, to assess if there is acknowledgement and consensual agreement regarding the trends that are arising in the hotel industry; and to understand how they are adapting or planning to adapt their hotels in order to address the millennial generation's requirements, and Asian guests as well.

Lastly, as a representative of the millennial generation, the author of this dissertation gives his personal contribution by criticizing some of the trends that were considered relevant for the success of the hotel industry, and complementing this criticism with other trends that were not previously mentioned, and should also be addressed and deemed relevant for hoteliers to consider in the success of the hotel industry.

## **Tourism Evolution Worldwide**

For more than six decades, the tourism sector has been experiencing continuous development and diversification, being perceived nowadays as one of the global fastest growing sectors. With many new worldwide destinations constantly emerging throughout the last decades, the number of international tourists has shown

a tremendous increase, rising from 25 million guests in 1950 to 1,138 million in 2014<sup>2</sup>.

Bearing in mind the investment needed for opening and promoting new destinations across the globe, such as the creation of new jobs and enterprises, as well as the development of infrastructures, it is no surprise that, through export revenues, this sector has become a key driver of socio-economic growth. In fact, in 2013 tourism accounted for 9.5% of the world's Gross Domestic Product (GDP), through direct, indirect and induced impact, and it is projected to increase to 10.8% by 2024<sup>3</sup>.

Looking ahead, international tourist arrivals are forecast to continue growing as much as 3.3% from 2010 to 2030, reaching 1.8 billion by that period. Furthermore, besides the expected traditional growth in Europe and North America, emerging destinations will be playing a key role in the upcoming tourism evolution. More precisely, journeys to emerging destinations are projected to increase twofold when compared to journeys to more traditional tourism destinations in developed countries (+4.4% versus +2.2% a year), from 2010 to 2030<sup>4</sup>.

## **The Future of the Hotel Industry**

The hotel industry is directly influenced by the trends that emerge in the tourism sector, in general. Therefore, and bearing in mind that globalization has become the most powerful force of international business, which will continue to origin the expansion of tourism for the next several years, it seems sound to deduce that the same will happen regarding the hotel industry.

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<sup>2</sup> Ratnapala, L. (2015). *Asia to Drive Strong Growth in Global Tourism*

<sup>3</sup> WTTC, (2014). *Travel & Tourism Economic Impact 2014*.

<sup>4</sup> Ratnapala, L. (2015). *Asia to Drive Strong Growth in Global Tourism*



Aware of these positive perspectives concerning tourism development, especially in emerging markets, several private equity real estate funds have initiated a race for prime locations in South East Asian, Latin America and Sub-Saharan African countries. With a desire to subsequently assign their buildings' operations management to recognized hotel brand operators (e.g. Hilton, Hyatt, Marriott and more), these investors focus their selection of criteria on countries with the greatest economic growth predictions and infrastructures development (e.g. airports, railways and more).

It is then expected that the competition between hotels will get fiercer over time, and that there will not be enough opportunities for every hotel to thrive within the industry. For these reasons, players with a vision capable of understanding current characteristics and predicting trends for their next generation of customers will definitely benefit from it. In other words, those who are able to understand the impact of emerging trends and adjust their products and services offerings accordingly, will grab the rising opportunities, and therefore succeed as game changers. On the other hand, players who lack this vision and/or take too long to respond to necessary adjustments will be left behind and considered as industry spectators.

#### **Focus on Millennials and Asian travellers.**

According to EY<sup>5</sup> the performance of the global hospitality sector over the next several years will be strongly driven by the growing worldwide spend of just two groups – Millennials and Chinese travellers.

In fact, BCG<sup>6</sup> states that by 2030, Asian tourists will lead the world's total travel expenditure. Although China will be the most significant contributor to this

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<sup>5</sup> EY, (2013). *Global Hospitality Insights: Top Thoughts for 2014*

<sup>6</sup> The Boston Consulting Group (BCG), (2013). *Winning the Next Billion Asian Travelers—Starting with China*

growth (accounting for about 40 percent of Asian outbound tourism)<sup>7</sup>, a billion people in Asia will have annual earnings of USD\$15,000 or more, and will be willing to spend part of it on airlines, hotels and tour companies around the world. A vast majority of these travellers will come from China, India, Indonesia, Japan, South Korea and Singapore.

Relating the information above with the theoretical model of market segmentations – **see appendix 1** - it seems accurate to restrict the focus of this dissertation to two specific groups: (A) Millennials – based on a combination of behavioural and demographic segmentation; and (B) Asian travellers, based on a geographical and cultural segmentation.

**A. Millennials** – These are the individuals belonging to the millennial generation, also known as the next generation or generation Y (since it comes after Generation X). This group encompasses individuals who were born between 1979 and 2000. Having already outnumbered baby boomers in many countries, Millennials represent 1.8 out of 7 billion people worldwide<sup>8</sup>.

**B. Asian travellers** – Leading this group, we have China. General predictions state that Chinese leisure travellers will be the world's biggest spenders. This seems plausible, if one considers that, by 2030, around one billion people will be the middle class in China (70% of its projected population)<sup>9</sup>. Nonetheless, future travellers coming from India, Indonesia, Singapore, Philippines and Malaysia must be also considered as relevant.

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<sup>7</sup> Outbound Tourism - Comprises the activities of a resident visitor outside the country of reference, either as an outbound tourism trip or as part of a domestic tourism trip

<sup>8</sup> Millennial Week, (2015). *Millennials: By the Numbers*

<sup>9</sup> EY, (2013). *Hitting the Sweet Spot: The Growth of the Middle Class in Emerging Markets*

As a vast share of the second group – Asian travellers – corresponds also to the first group – Millennials -, and for matters of coherence and preciseness, from hereon, individuals belonging to the millennial generation will be this thesis focus, as the core influencers of the future performance of the hotel sector. Although, throughout this thesis, particular characteristics belonging to the second group will be additionally mentioned.

Taking the previous projections into consideration, one should support the idea that hoteliers must continue shifting their attentions to Millennials. This is the next generation of travel, which will represent their main customer base in the near future. Hence, in order to guarantee their business success and sustainability, hoteliers need to concentrate on addressing this group's travelling essentials, by evolving and adapting their hotels to keep pace with the new millennial trends arising on the demand side of the hotel industry.

### **Millennial Guests - Main Characteristics and Emerging Trends**

Millennial guests feature several distinctive behavioural characteristics, which in turn lead to various emerging trends that are impacting the hotel industry, such as follows:

*A.*     **Speed demon:** One of the factors that characterizes the millennial generation is their obsession with speed. When buying a product or service, Millennials are much less patient than previous generations. Also called the 'now generation', Millennials demand instant satisfaction, efficiency and convenience. In fact, when acquiring a service, they can give more importance to fast service than to face-to-face contact or friendly service.

*B.*     **Persistent auto-biographer:** Several Millennials manifest a need and a desire to involve friends and family in their life, by documenting and sharing their experiences through the social media. They tend to share unique, pleasurable and inspiring moments of their daily routine, giving others the perception they are living different experiences and enjoying their life to the fullest. In exchange, they expect and look for friends' and followers' recognition (e.g. through obtaining “likes” on their social webpages).

*C.*     **Social beings:** Although Millennials give less emphasis to face-to-face contact than previous generations, as mentioned before, this generation is sometimes called the social generation, given their strong desire for being socially active.

- At an **online** level of social activity, unlike individuals from prior generations, who tend to call friends and family to share their experiences and discoveries regarding a certain city or hotel, Millennials do it differently. This generation shares their experiences by posting online pictures and reviews on their social media webpages. By doing so, they can easily reach thousands of people in a short period. Another aspect worth mentioning is the fact that, when connecting online, Millennials like to practice “social togetherness”. This concept means that, while accessing their individual laptops or smartphones, Millennials enjoy being surrounded by other people, in public areas.

- At an **offline** level, Millennials are also a very sociable generation, keen on travelling with friends, family, or even people that they have not met previously. In fact, 58% of Millennials (20% higher than the previous generations) prefer to travel

with friends<sup>10</sup>. They simply cannot stand the feeling of having missed out on a possibly unique trip - FOMO<sup>11</sup>.

**D. Undercover critic:** Unlike previous generations, Millennials are much less likely to complain and/or criticize immediately, to people's faces, when dealing with a problem or when their expectations about a product or service were not met. Instead, Millennials are increasingly resorting to using websites and mobile applications, such as Trip Advisor and Yelp, to share not only positive, but also negative criticism or reviews. More than ever, hotels face a 24/7 pressure to provide their best service.

**E. Spontaneous decision-maker:** There is no doubt that Millennials are the tech-savvy generation. They grew up in touch with smartphones and constant access to the Internet. This access to more information, combined with the fact that this generation may have grown up with tighter wallets, might well be the reason why they have become spontaneous decision-makers. In order to save money, Millennials have no problem in buying last-minute deals and packages. In truth, they even feel very comfortable with it, looking at booking a hotel as a funny game to take advantage of low prices and attention-grabbing packages.

**F. Millennials' scepticism:** Millennials are less likely to become loyal towards a brand than previous generations. Alternatively, when booking a hotel, more importance is given to other aspects, such as price-value ratio, hotel location, peer recommendations and online reviews. Actually, brand image itself comes only in 4<sup>th</sup> position in the Millennials' selection criteria, when booking a hotel – **see appendix 2.**

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<sup>10</sup> Lee, T. (2013). *Top 10 Trends of the Next Generation of Travel: The Millennials*

<sup>11</sup> FOMO or “Fear of Missing Out” is a phenomenon born from the Millennial Generation, and stems from a deep-seated concern that your friends or the person sitting next to you is having more fun. (Lee, T. (2013)).

In this sense, when compared to prior generations, Millennials tend to be more sceptical, but if they are presented and offered with the right product or service they will have no difficulties in becoming loyal. Actually, this generation tends to be very sensitive to personalization and customized guest experiences. According to Benji Greenberg, founder and CEO of BCV<sup>12</sup>, Millennials want experiences built for them; they want to feel special.

**G. Cause activist:** Growing up during an era where the issue of social responsibility and sustainability gained tremendous magnitude and awareness in modern societies has changed Millennials' minds towards taking action and engaging in sustainable practices. In fact, 77% of millennial travellers believe it is imperative to address causes that are important to them<sup>13</sup>. This trend is causing a substantial impact on the hotel industry as well, as Millennials will prefer to book reservations at hotels that engage in environmental or community responsible programmes. This is due to the fact that, when doing so, Millennials will feel self-fulfilled, knowing that part of their money spent in that hotel is also going towards a programme that helps making the world a better place.

**H. Curious explorer:** When travelling, Millennials demand to have a “more complete” experience out of their chosen destination than previous generations. While most older travellers focus their trips on visiting and learning more about the well-known and local tourist landmarks, for Millennials that is only half of the journey. They also demand to get a whole new experience outside the typical tourist visit. Millennials are curious about the local culture and will seek experiences that allow them to get in touch with other people and live authentic local experiences.

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<sup>12</sup> BCV is the premier social media provider in the hospitality industry

<sup>13</sup> PGAV Destinations, (2011). *Meet the Millennials: Insights for Destinations*

*I.*     **Sharing Economy:** The sharing economy is not a novelty in the tourism sector where consumer-to-consumer rentals have been around for a long time. However, advances in new technologies, along with the Millennials' high-tech ease and curiosity regarding demanding new, authentic and cheaper experiences are leading to an explosion of this sharing economy. Furthermore, millennial visitors and residents are leading the development of the sharing economy, currently sharing homes, cars, boats, meals and more. For example, there is AirBnB and HomeAway for accommodation; Blabla Car and Zipcar for car sharing; ParkatmyHouse for parking; HomeFood and Meal Sharing for eating.

## **How are the World's Main Hotel Brands Adapting to the New Demand Trends?**

Aware of the millennial generation's dimension and the potential impact it may trigger on their future success or failure, many global chains have already started planning and/or adapting their hotels in order to satisfy some of the main requirements that are coming along with millennial and Asian travellers.

Since most players in the hotel industry rapidly copy the innovative ideas that are implemented by first-mover hotels, many brands end up sharing the same novelties within a short period of time. Therefore, this part will be exclusively focused on **three** of the world's main brands, regarding the measures being taken in order to target what will soon be their core customer base.

### **Marriott International**

In 2013, Marriott International announced a shift in its target audience focus, communicating that, as of that date, it would start tailoring its hotels and its marketing efforts towards millennial consumers. To help rebrand the hotel chain, Marriott

launched, in the same year, the “Travel Brilliantly” promotional campaign, aimed at engaging next generation guests. This campaign includes not only a new logo for the Marriott brand but also several other innovative and fresh ideas for the company’s image. For example, as a new source of marketing, Marriott is revealing, on the campaign website<sup>14</sup>, past innovations already implemented and future innovations that are currently being developed. On this website, opinions and future-forward ideas from influencers, experts and travelling consumer enthusiasts are also encouraged. This use of customers’ crowdsourcing and co-creation on behalf of hotel brands may well be the future of hotel industry marketing.

Moreover, Marriott has started reworking its hotel room design to be more appealing and personalized to younger travellers' sensitivities. Likewise, it has been reworking and refurnishing its lobbies to make them more welcoming and sociable, with Starbucks cafes, free Wi-Fi and bistros where meals and plenty of alcoholic drinks are constantly being served. Additionally, to respond to the Millennials’ obsession with fast service, Marriott has developed an online application that allows customers to check in and check out via their mobile phones. This way, customers can check into the hotel even before getting there and just grab their key at the front desk when they enter the hotel. To check out, guests need a simple tap on their smartphone and they are ready to leave the hotel, without having to go through the front desk.

Keeping in mind that Millennials, especially younger Millennials, are super sensitive about green, Marriott established a goal of a 20% reduction in energy and water consumption per room, compared to its 2007 baseline. To accomplish this goal, the company has implemented advanced technologies in its hotels, which allow them to monitor, control and maximize consumption efficiency.

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<sup>14</sup> <http://travel-brilliantly.Marriott.com>



Regarding Asian travellers, Marriott launched the “Li Yu” (“serve with courtesy” in Mandarin) programme, aimed at providing a full array of services and amenities designed particularly for Chinese guests. When booking a hotel, Chinese guests receive their reservation confirmation email in Chinese, and when arriving at their hotel Mandarin-speaking staff will welcome these guests. Besides, Chinese dishes were included in the hotel restaurants and in-room dining menus, as well as Chinese TV programmes, which are now featured on these guests’ in-room TVs. Finally, Chinese guests are assigned floor and room numbers with “6” or “8”, as these are considered auspicious numbers. These rooms are also provided with Chinese language newspapers, kettles and complimentary Chinese tea, as well as bathrobes, slippers and electrical adaptors for Chinese gadgets.

### **Carlson Rezidor Hotel Group**

Radisson Red Hotels is a new hotel brand announced by the Carlson Rezidor Hotel Group. The first hotel will be launched in 2015 and the company aims to open more than 60 Radisson Reds across the globe until 2020.

This will be a millennial-friendly brand focused on satisfying its customers’ needs for a personalized experience. Guests will not only be able to customize their rooms in terms of food and beverage choices and watch movies on the room walls, but they will also be provided with free Wi-Fi and a mobile application to check in, check out, pay their bar tab, order room service, and get information about the hotel amenities. Besides, Radisson Red’s public spaces are designed to resemble an art gallery with a reading room, which becomes a lounge at night, where guests can enjoy a billiards room and a 24/7 open bar.

### Starwood Hotels and Resorts Worldwide

Aloft Hotels is a tech-forward brand, specially designed for guests of the future - millennial-minded travellers. This mid-tier brand, which is growing at a phenomenal pace, with already 100 established hotels and coming soon into 14 different countries, was launched in 2008 by its parent company - Starwood Hotels and Resorts Worldwide, Inc. In order for this youthful brand to have an equally matching image, Aloft Hotels has recently partnered with a modern design brand – Design Within Reach - to redesign and decorate its hotel public spaces.

Also, to achieve the desired trust and enhance bonds with its target audience, Aloft Hotels brand supports several music-related initiatives, such as a collaboration with MTV Asia and the twice-yearly sponsoring of the “Live in the Vineyard” music festival in the California wine country, which attracts singers like Gavin DeGraw and James Blunt. Furthermore, across every Aloft hotel worldwide, customers are invited to leave their rooms and socialize in the re-mix lounges or in the W XYZ bars, that “offers live, free access to local emerging artists as well as some of the hottest bands with Live at Aloft Hotels programming W XYZ® bars”<sup>15</sup>.

The tech-forward brand also introduced a keyless entry system in their hotels, allowing members of the Starwood’s loyalty program – SPG (Starwood Preferred Guest), to use their smartphone as a key. This system redefines the traditional way of checking in and out. It enables guests to check in and out with a simple tap on their smartphone, permitting them to bypass the front desk and go directly to their rooms.

In order to cater for Chinese guests, Starwood launched the Starwood Personalized Traveller program. This program addresses the unique preferences and cultural differences of Chinese guests, by providing specific amenities to these guests' rooms, such as teakettles, slippers and instant noodles. Likewise, at check-in, Chinese

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<sup>15</sup> MarketWatch, (2014). *Aloft Hotels Set to Debut in Columbia, South Carolina*

guests will receive a package of local information in Mandarin, which includes tips on shopping and sightseeing. Lastly, Starwood has translated their restaurant menus into Mandarin and added traditional Chinese dishes (e.g. congee, noodles and more).

## **Critical Analysis**

At this point in this dissertation, a critical analysis will be conducted to evaluate the measures that are being and/or should be taken from the supply side of the hotel industry, in order to meet the arising requirements on the demand side. In other words, how appropriate and effective the adjustments that hotels are embracing may be, in order to satisfy their latest generation customer base – Millennials. Subsequently, the same emphasis will be also given regarding Asian travellers.

### ***Main Recommendations:***

#### **- Free – Wi-Fi**

This is undoubtedly the first feature that hoteliers should take into consideration, if they want to maintain the competitiveness and attractiveness of their hotels.

For millennial guests it is illogical that a hotel should charge for Wi-Fi service, when hostels offer it for free and at a significantly lower daily rate. Therefore, when booking a hotel stay, high-speed Wi-Fi is the primary feature that this generation of guests is expecting, at no cost. In fact, Millennials are willing to opt for a hotel that has a higher daily rate, but offers free Wi-Fi. In contrast, when Wi-Fi comes at a cost in a hotel, these guests of the future will certainly not opt for it.

- **Social Responsibility engagements**

As previously mentioned, individuals belonging to generation Y were born with a greater sense of social responsibility than others from prior generations. This already important tendency towards sustainability and social awareness will become even more important and has to be taken into consideration. Therefore, in my perspective, this increase in social awareness is leading to a new trend towards a different type of tourism – Solidarity Tourism.

Hence, hotels should consider being more proactive regarding social responsibility, by partnering with social organizations and associations in order to develop and engage in social projects. Allowing volunteer guests to be devoted to social projects, away from their homes, is a valuable opportunity for Millennials. Moreover, working in a cosmopolitan environment, with guests from different countries, and for a common cause, provides them with a unique experience. In return for their volunteer time on social projects, hotels could provide guests with free accommodation.

Again, this is what I consider to be the next trend regarding social responsibility in the hotel industry. The fact that many hotels are presently bragging about their efforts to reduce energy consumption should not be considered as a valid socially responsible gesture. While they claim to be doing it in order to protect the environment, what they are really concerned about is profit maximization through cost reduction. Therefore, being truly engaged in this sort of causes – Solidarity Tourism - will generate not only great impact on the hotel reputation but also on the customers' local experience.

### - **Digital Marketing Initiatives**

Thanks to the fast evolving technology, the use of digital marketing has increasingly become a powerful source for hoteliers to interact with their guests. As such, the use of digital marketing via social platforms like Facebook, Twitter, Google+, LinkedIn, Instagram and Pinterest need to be considered and used by hoteliers as a key marketing strategy for their success within the hotel industry. Hoteliers must focus on structuring a specific team/department exclusively dedicated to promoting hotel experiences on social media, interacting with current and potential guests and fostering the online sharing of content among them.

The fact that millennials are super sensitive about other guests' and peers' reviews creates an enormous opportunity for hoteliers to encourage guests to share their experiences on social media, therefore using their own guests as brand ambassadors and promoters. For example, hotels can reward guests that share pictures and/or videos related to their hotel-related experiences on the hotel's social webpages, with a free dinner or a free drink. Such initiatives will surely create more brand awareness than traditional and obsolete advertising formats, reaching thousands of people within a couple of minutes, at the cost of a free dinner or drink to a happy guest.

### - **Peer review management**

Nowadays, Millennials constantly assess review websites, such as Trip Advisor and Yelp, before booking a hotel. This sort of websites provide customers with an organized and ranked list by votes, which may well put a hotel at the top of the list, or hide it at the bottom, where guests do not even care to go. However, these websites offer the hotels the chance to respond to negative comments, allowing

reviewers to change their initial perspective or offer a follow-up evaluation, based on the hoteliers' answers. Nonetheless, this is only possible if the hoteliers monitor their online reputation. Thus, it is indeed imperative that hotels start allocating personnel to monitor reviews, in order to build and/or defend their existing reputation.

- **Group promotions**

As already mentioned, the millennial generation is also considered the social generation. The fact that Millennials frequently travel with friends should be more taken into consideration by hoteliers, in the sense that most hotels do not offer attractive travelling packages for extended family/friends groups. The nonexistence of these deals is probably one of the major reasons that leads Millennials to opt for other types of accommodation, such as renting tourist apartments, using AirBnB or booking hostels instead.

At a time when hoteliers repeatedly accuse platforms, such as AirBnB, of taking away their revenues, it would be notably beneficial for them to focus on providing new solutions, such as offering group promotions. For example, a group of 6 people would pay for two double-rooms during their stay, and would be given the third room for free.

This would certainly lead millennial groups to think twice before booking an alternative tourist accommodation, as hotels would constitute a more tempting offer, with daily room cleaning and other types of comforts that are not provided in hostels and/ or tourist apartments, at a price difference that is probably unjustified.

Lastly, hoteliers need to understand that regulation is not the solution to regain competitiveness. Instead of waiting for the government to apply regulations on alternative accommodation providers, hoteliers need to act more proactively towards growth, expansion and innovation.

- **Mobile application**

One revolutionary feature of the hotel industry, which several brands have already implemented, is the creation of mobile applications for hotels. This initiative may have great potential, if the developed mobile application is presented with remarkable quality and performance.

The fact that Millennials are presented with a service that allows them to check in, pay their bills and check out without having to get into queues at reception provides millennial guests with the technological convenience that they are familiarized with. Moreover, having access to recommended tours, restaurants, nightlife, shows, shopping, services and best places to visit in town, with a simple smartphone application, and without having a time-consuming conversation with a receptionist, makes it even more attractive and comfortable for millennial travellers. This is the type of personalized service that makes guests feel valued.

- **Check-In kiosks**

The implementation of check-in kiosks is a good solution or alternative for millennial guests who do not like to wait in the check-in queues at the reception, and did not have the opportunity to download the mobile application before arrival. It is the type of timesaving technological feature that is appreciated by guests of this generation. It is important to argue that this must not be considered as a poor alternative, but instead as a different type of service, as guests with a more traditional mindset will continue to be able to choose the friendly front desk check-in.

- **Mini-bar attractive prices**

Millennials are considered smart-spenders, who prefer to save money on products and spend it on something that can offer them a better experience or service. Therefore, and considering the aggressive prices that are charged by hotel chains regarding their in-room mini-bars, it is not reasonable to expect this generation of guests to incur in such expenses. Alternatively, price-conscious guests will prefer to buy the desired products at a fair price, in the nearest convenience store.

However, if a different logic is adopted by hoteliers, chances are high that they will start profiting from the Millennials' consumption of food items and drinks at their in-room mini-bars: Instead of being focused on high-profit per product, which will simply happen on occasional situations, hoteliers should consider profiting from their guests' mass consumption. For example, if the mini-bar price of a beer is simply 40 or 50 percent more expensive than in a supermarket, or even a convenience store, chances are high that most guests will prefer paying that difference to have the convenience of immediate access to the desired product.

Nonetheless, considering the competitive environment in the industry and the need to lead and stay ahead of the competition, I believe that, in a near future, hotels will start offering customers free daily consumption of some mini-bar items (e.g. 2 beers / 2 sodas; 2 waters and 1 snack). As such, products will be daily refilled at no charge, as if they were included in the room's daily rate. This can also be interpreted as a marketing tactic to tempt guests, since after finishing their two free beers from the mini-bar, perhaps they will move to the lobby bar for another drink, and there hotels can benefit from high profit margins.



- **Lowest price guarantee**

The lowest price guarantee is a smart approach that is currently being adopted by several main hotel brands, to get guests to use their websites directly whenever booking their stays, instead of keep using online travel agencies (OTAs). For example, Starwood “Best Rate Guarantee” guarantees that the rates published in their website are the lowest prices available. In case a customer finds a better rate available for that same Starwood hotel, before or 24 hours after making the reservation, the same customer will receive a 20% rate discount or 2,000 SPG Starpoints.

This is the type of initiative that will certainly be followed by Millennials, who always check several different online sources and compare prices, trying to find the best available rate. If hotels adopt this practice, guests will save time and start booking directly from the hotel website, knowing that they are booking at the best available rate. What is more, this is a remarkable marketing move, as it allows hotels to solve one of their biggest concerns: how to avoid paying OTAs a 30-to-40 percent commission every time a reservation is booked through their websites.

- **Social Webpage**

The creation of social webpages on social media is probably the simplest and easiest initiative that hotel brands should implement as an easy mean to engage the millennial generation, who always gather online data and information before taking decisions.

The simple process of hoteliers creating social webpages and using them, for example, to allow guests to make room reservations via Twitter or share photos of hotel events on social webpages, such as Facebook and Instagram, can create a tremendous impact on the success of their hotels. Moreover, having the possibility to

regularly post real-time photos of current promotions or events will certainly grab the Millennials' attention.

Ultimately, social media should not be disregarded or ignored by hotel brands. Instead, brands should look at them as a free means of advertising and a source of revenues, as well as a good way to interact with their customers to assess what could be improved in the hotel.

- **Providing authentic local experiences**

As already mentioned, the millennial generation, the future of travel, does not get fully satisfied with the typical tourist journey. This generation craves to get something extra out of their travel experiences, such as getting in touch with local culture, gastronomy, entertainment, outdoor activities and more.

To help satisfy these interests of the new generation of travel, hotels can, for example, create outsourcing contracts to have scooter rentals right at their doors. Being more than a viable business in European capitals, this would provide millennial guests with a valuable extra. Also, giving guests information about local markets and food and wine tasting events is something that is highly valued by guests.

These simple initiatives may be very significant for Millennials, who care about details and appreciate personalized offers. In addition, this will certainly be something that guests will take into consideration when rating their hotel stay, spreading their word of mouth about it, or sharing their experiences on social media.

- **Addressing Asian travellers' needs**

With demographic and economic development, alongside with the ease on outbound travel restrictions, which is changing the travelling habits of this region's population, it is expected that the Asian millennial traveller will dominate a large

share of the world travel demographics. Moreover, according to Oxford Economics<sup>16</sup>, within 10 years, Asia will overtake Europe as the region whose tourists spend the most money abroad. Leading this expansion of the Asian region is the vast growth in the number of Chinese travellers.

Bearing in mind the great importance that Asian travellers can potentially bring to the future success of their hotels, hoteliers need to start meeting the necessary requirements in order to attract these guests. In doing so, it is fundamental to acknowledge that even if a big share of Asian travellers is part of the millennial generation, there are significant cultural differences that influence their needs.

As a great majority of these travellers use the Internet and social media to plan their trips – **see appendix 3** – hoteliers need to be aware that, for example, in China, social media webpages are a completely different reality from that of the western world. In China, instead of Facebook or Twitter (which are censored there), people use local platforms such as RenRen, Weibo, WeChat and others to post and search for hotel experiences. Therefore, these websites should be also used and monitored by hoteliers, in order to respond to Chinese customers' reviews and needs.

Moreover, hoteliers should carefully analyse what constitutes the most desired amenities for Asian travellers. For example, it is known that, for Chinese guests, having slippers and a teakettle in their room is considered as an expected amenity – **see appendix 4**. Therefore, hotels should take the opportunity to address these prerequisites without incurring in large expenses (e.g. slippers and/or a teakettle). This simple measure may well put a hotel ahead of its competition. Additionally, this measure may be a decision factor between a bad or a good review from Chinese

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<sup>16</sup> Oxford Economics, (2014). *Shaping the Future of Travel: Macro Trends Driving Industry Growth Over The Next Decade*

guests, who would probably get disappointed if these simple amenities were not included.

## Portuguese Scenario

### Tourism in Portugal

Over the past decades, Portugal has been drawing a lot of attention as a tourist destination, mentioned by many as the favourite destination to spend their vacations. With a great climate, some of the most beautiful beaches in the world, outstanding cuisine and with an enviable cultural heritage, Portugal has been elected by Condé Nast Traveller as the world's best destination to travel in 2013. Moreover, in the World Travel Awards 2014, Portugal achieved 16 awards, a great opportunity to showcase the country at an international level<sup>17</sup>.

In 2013 Portugal had approximately 15.2 million guests hosted within the country's several tourist accommodation – **see appendix 5 for a detailed analysis**. It is worth mentioning that around 57% of those guests were foreigners. This fact allows us to have a clear idea of the importance of foreign tourists in the Portuguese economy, where, in 2010, the tourism sector accounted for 9.2% of the country's GDP<sup>18</sup>.

Since this dissertation will be focused exclusively on the hotel industry, one should distinguish that from the total number of tourists hosted in tourist accommodations, about 69% of them stayed at hotels, contrarily to the remainder 31% who chose other types of tourist accommodation, including hostels, tourist apartments, “pousadas”, tourist villages and more.

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<sup>17</sup> PortugalGlobal, (2014). Portugal wins 16 top honors at the 2014 World Travel Awards Europe

<sup>18</sup> Publituris, (2014). *Turismo representa 9,2% do PIB em Portugal*

### Tourism Evolution in Lisbon in the Last Years

Considered one of the most beautiful cities in the world, with several awards such as the Europe's Leading City Break Destination (nominated three times since 2009); second place in the European Best Destination in 2013<sup>19</sup>; and 4th Most Beautiful City in the World<sup>20</sup>, Lisbon is a destination that is increasingly in vogue. Furthermore, according to a study conducted by Trivago - a travel engine focused on hotels, Lisbon is the most popular Portuguese destination at an international level, ranked above Albufeira, Porto, Portimão and Lagos.

In the last 10-year period, from 2003 to 2013, the region of Lisbon registered a remarkable increase of 72.6% in international visitors, having had about 3 million international tourists hosted in tourist accommodation over that year. Moreover, still in 2013, a high share of 67% of the total 4.5 million people hosted at several tourist accommodations in the Lisbon region were international visitors. Hence, we can determine that the national market represented a mere 1.5 million people.

Bearing in mind that this project is exclusively focused on the hotel industry, and the city of Lisbon, one should highlight that from the total of almost 4.5 million guests, about 3.8 million were hosted in hotels. From that number, about 69% were international visitors. This gap between national and international market demand is even more marked when we take a look at the number of overnights booked by one and the other. With 6.5 million booked overnights, international visitors represented around 76% of the overall hotel industry demand - **see appendix 6 and 7 for a detailed analysis**. Although it is perceptible that while the national demand for hotels has decreased over the course of time, this is counter-balanced by an increase in the international demand for hotels.

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<sup>19</sup> YellowBusTours, (2014). *Lisbon is the second best "Best European Destination in 2013"*

<sup>20</sup> ThePortugalNews, (2013). *Lisbon Voted World's Fourth Most Beautiful City*

In a more detailed analysis concerning the evolution of Lisbon's specific figures of the hotel industry, over the last 5 years (from 2009 to 2013), it was observed an increase of 42.5% in the total number of hotels (from 146 to 208), 22.5% in the total number of hotel rooms (from 18,583 to 22,758), 7.9% in occupancy rates (from 58.1% to 62.7%) and 6.1% in the Revenue per Available Room (RevPar) – **see appendix 8, 9, 10 and 11** for a more detailed analysis.

Nonetheless, the fact that there is a continuous appearance of other sources of accommodation, such as hostels and tourist apartments, must be considered as a threat for the hotel industry. Therefore, this should be seen as another motivation for hotels to try to adjust, responding to emerging trends on the demand side. Otherwise market will be lost to other accommodation options that can fulfil guests' expectations, due not only to the lower practiced prices but also due to the different and valuable experiences that these alternative sources of accommodation provide.

## **What are Lisbon Hotels Doing to Attract Millennial and Asian Travellers?**

Having interviewed **twelve** independent **4 and 5 start hotels** – **see appendix 12 to 23** – this section is devoted to measuring, based on the presented sample, how prepared and adapted the city of Lisbon is to respond to the evolving needs and trends of their future core guests – Millennials and Asian travellers (in the survey, Chinese guests were used as a sample test for Asian travellers).

Regarding targeting Millennials and the respective trends that are arising with this generation, we can observe that there are already some undergoing investments from hoteliers to adapt their hotels to the basic needs of this generation. Only a few hotels are currently charging for Wi-Fi, and all of them already provide LCD TV's to every room, as well as a website compatible with other mobile devices. Moreover,

every hotel is currently monitoring and managing their online reputation and interacting with guests, in order to improve their offering of services and amenities, through social media webpages and hotel review websites such as Trip Advisor.

Concerning non-basic and more technological services and amenities, which are the most innovative and thus more appealing and distinguishing factors, such as mobile applications, check-in kiosks, tablet interface and the keyless system, Lisbon hotels are still very under-equipped. This is probably because most hotels have not yet implemented these features, therefore meaning that most market players still feel comfortable and complacent about their current situation.

In what concerns what has been done so far regarding the needs of travellers coming from Asia, it seems reasonable to assume that there is still a long way ahead. Although most of Lisbon hoteliers are perfectly conscious about the potential of Asian tourists, they are still cautious and uncertain about investing in offering specific amenities for these guests, as today there is still an absence of direct flights to bring large flows of Asian tourists to Lisbon. Therefore, investing specifically in providing these guests with their desired amenities is not yet deemed a viable and rewarding choice for most hoteliers. Although most hotels already offer basic amenities such as slippers and tea kettles (which are also desired amenities to guests from other regions), very important and specific features are still not being addressed, such as accepting international cards (e.g. China Union Pay), having an online presence on Chinese social media webpages, having Chinese-speaking staff and more – **see appendix 24.**

## Conclusion and Recommendations

Having been raised in such a dynamic and well-informed world as the one in which we live today, with constant access to the latest information such as new brands, products and services emerging throughout the globe, has contributed significantly to shaping the priorities of the millennial generation when travelling.

As mentioned before, this generation features distinctive characteristics, compared to prior generations, which will certainly shake the hotel industry, in the sense that new travelling and lodging requirements will constantly emerge with them, and hotels will need to fully address the aspirations of this generation, who will soon become their core customer base.

Moreover, this industry will continue to observe an increase in both direct and indirect competition. The constant opening of new hotels, which offer more personalized services and amenities, as well as the entrance of new, cheaper and more engaging concepts of lodging (e.g. hostels or tourist apartments), easily accessible to consumers due to digital platforms such as AirBnB, is revolutionizing the hospitality sector as a whole, and threatening the survival of the traditional hotel industry.

Besides, chances are high that, in the near future, a new trend for premium and personalized three and four-star hotel brands will emerge. With great value for money for a younger, and more cost-conscious generation, these hotels may well become a threat to five-star hotels, as Millennials are prone to trying new brands and different concepts, as long as they meet their needs.

Consequently, established hotel brands need to be willing to engage in proactive measures, creating new or modifying current concepts in order to maintain or regain their attractiveness. This investment is only successful if properly addressed to potential customers. These include the millennial generation, but also a new



segment of Asian travellers, who expect hoteliers to respect and attend to their basic cultural requirements.

Focusing on Portugal, namely in Lisbon's four and five star hotels, it is possible to observe that, throughout the last few years, there has been a significant progress on the part of this superior segment of the hotel industry, in adjusting their basic services and amenities to satisfy the latest trends and aspirations of their future customer base.

Nonetheless, for Lisbon's four and five star hotels to become more competitive and attract millennial and Asian travellers, the author presents **seven** major recommendations that hoteliers should implement:

1. Focus on digital Marketing, engaging and using guests as brand ambassadors and promoters on social media;
2. Deliver fast and free Wi-Fi;
3. Provide guests with a self-service check-in/out service, either via mobile application or kiosks;
4. Refurnish traditional lobbies to multi-use lobbies, including bars providing late evening snacks and drinks, encouraging guests to socialize;
5. Place a Mandarin-speaking employee at the front desk;
6. Have an online presence on Chinese social networking webpages, namely on daodao.com (Chinese version of Trip Advisor) and Renren (China's Facebook);
7. Accepting China Union Pay (the largest Chinese credit-card provider).

Last but not least, Lisbon's traditional four and five-star hoteliers must continue on the look-out for new trends and respond to them accordingly, in order to succeed in the future. Otherwise, hotel brands are likely to observe a loss in their customer base to other segments of the hotel industry, and/or to other lodging alternatives, that will probably not return to their hotels, at least not as often as before.

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## Appendices

### Appendix 1 - Bases for Segmenting Consumer Markets

Source: Kotler, P. and Keller, K. (2011). *Marketing Management*. 14th ed. Prentice Hall, pp.214-229

According to Kotler & Keller, Market segmentations divide a market into well-defined slices of groups of customers, who share similar sets of needs and wants. The marketer's task is to identify the appropriate number and nature of market segments and to further decide with one(s) to target.

The major types of segmentation methods that help marketers to find a target for a specific business includes: geographic; demographic; psychographic, behavioral and cultural segmentation.

Considering the hotel industry, the subject of this dissertation, the following types were considered:

- Geographical segmentation: This method divides the market into geographical units such as nations, regions, countries, cities or even neighbourhoods.
- Demographic segmentation: Divides the market on variables such as age, family size, gender, income, occupation, education, nationality social class, generation and more
  - o Generation: Each generation shares a number of cultural, political and economic experiences and has similar attitudes and values, as it is deeply influenced by the times in which it grows up.
- Physiographic: This segmentation uses a crossing between psychology and demographics to better understand consumers. Thus, buyers are divided into psychological/personality traits, lifestyle, or values. Nonetheless, people belonging to the same demographic group can reveal very different psychographic profiles.
- Behavioural: This method of segmentation divides buyers into groups based on their knowledge of, attitude toward, use of, or response to a product or service.
- Cultural – This segmentation implies that different cultural segments have sufficiently different needs and wants to require specific marketing activities.

#### Conclusion:

Considering this various segmenting approaches, hotels should target Millennials due to the behavioural and demographic segmentation factors (specifically due to income, as this will soon be the most active generation in the workplace, and to the generational factor).

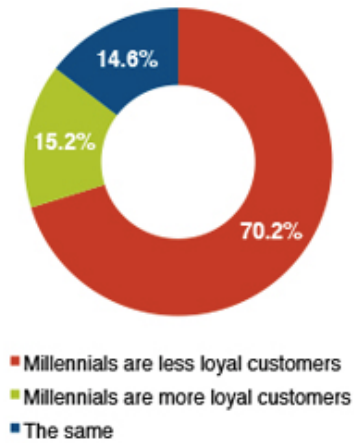
Moreover, Asian travellers should be also targeted, due to the correlation between the geographical segmentation (Asia contains about 1/3 of the world's population, which represents a huge market opportunity for hoteliers to cater for) and the cultural segmentation (Asian culture is very different from western culture, but similar within the region's countries, which presents a great opportunity for hoteliers to cater for a whole region just by adjusting to Asian travellers' cultural preferences).



## Appendix 2

Source: Bridge Over, (2014)

### Appendix 2.1 – Do you think that Millennials are more, or less loyal customers than previous generations?

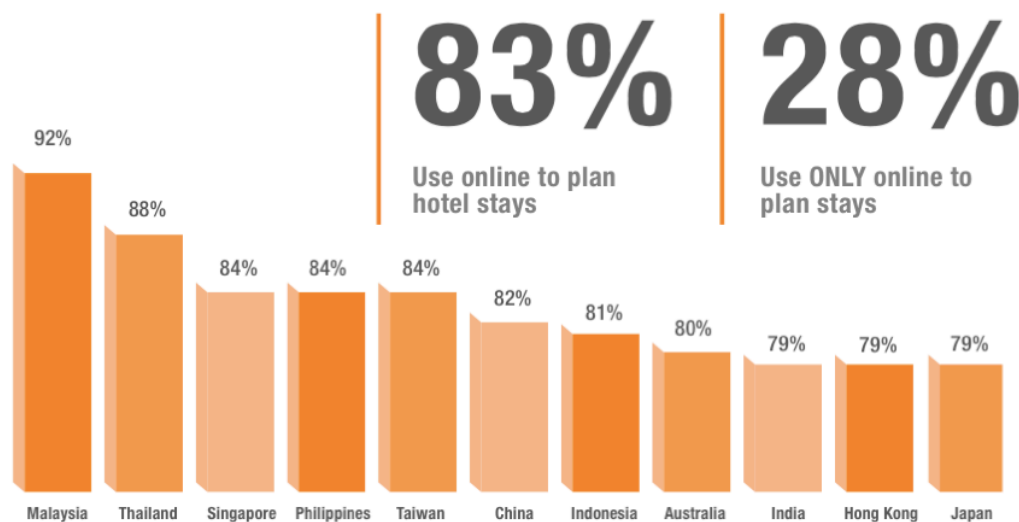


### Appendix 2.2 – Hotel selection criteria by importance



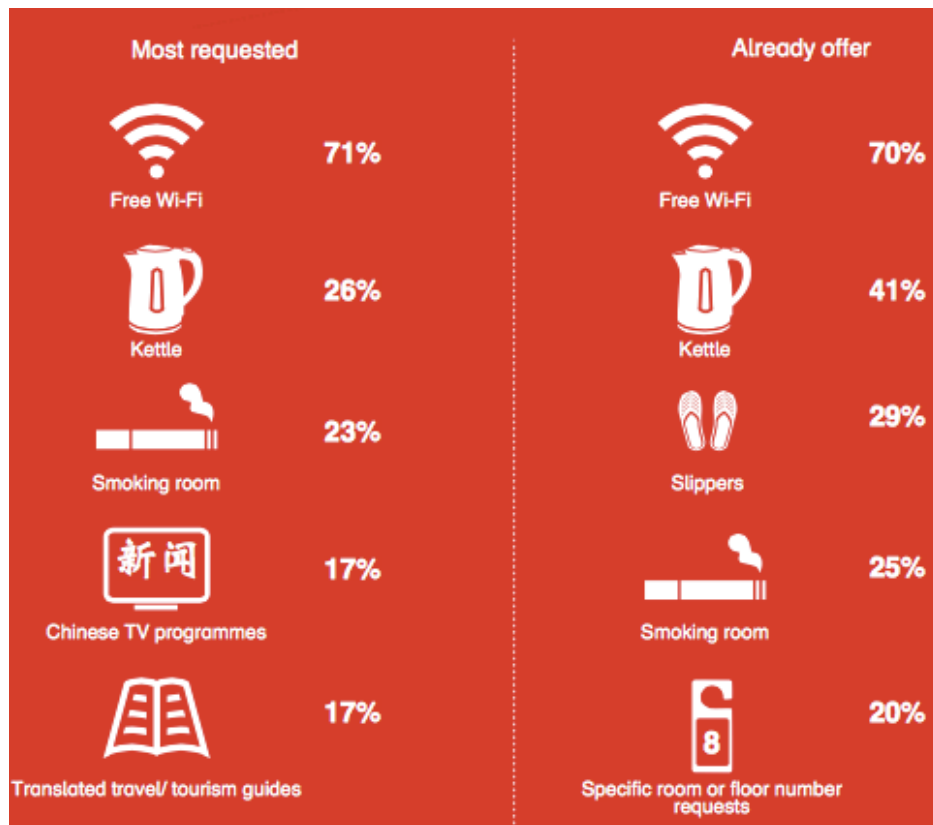
### Appendix 3 – 83% of Asian travellers use the Internet to plan their hotel stays

Source: TravelRave, (2013). *Navigating the next phase of Asia's tourism*



### Appendix 4 – Top 5 Chinese-specific products or services that are most requested by Chinese travellers on an international trip

Source: Hotels.com, (2014). The Chinese International Travel Monitor 2014



### Appendix 5 – Portugal: Total Guests hosted on Hotels VS On Total Tourist Lodging Facilities

Source: INE

Portugal							
Total Guests hosted on Hotels				Total Guests hosted on Tourist Lodging facilities (Hotels and Others)			
Year	Domestic	Foreigners	Total	Year	Domestic	Foreigners	Total
2003	2 882	3 367	6 249	2003	4 922	5 492	10 414
2004	3 040	3 621	6 661	2004	5 153	5 749	10 902
2005	3 373	3 794	7 167	2005	5 514	5 956	11 469
2006	3 644	4 235	7 880	2006	5 866	6 511	12 377
2007	3 959	4 597	8 556	2007	6 319	7 048	13 366
2008	4 005	4 631	8 636	2008	6 347	7 110	13 456
2009	4 100	4 259	8 358	2009	6 449	6 479	12 928
2010	4 483	4 695	9 178	2010	6 706	6 832	13 537
2011	4 574	5 180	9 754	2011	6 581	7 412	13 993
2012	4 431	5 407	9 838	2012	6 161	7 685	13 845
2013	4 485	5 958	10 443	2013	6 582	8 628	15 210

Unit: 000'

## Appendix 6 – Lisbon: Total Guests hosted on Hotels VS On Total Tourist Lodging Facilities

Source: INE

Lisbon							
Total Guests hosted on Hotels				Total Guests hosted on Tourist Lodging facilities (Hotels and Others)			
Year	Domestic	Foreigners	Total	Year	Domestic	Foreigners	Total
2003	777	1 453	2 230	2003	1 038	1 746	2 783
2004	839	1 642	2 481	2004	1 113	1 978	3 091
2005	932	1 668	2 600	2005	1 231	2 006	3 237
2006	1 028	1 812	2 840	2006	1 358	2 205	3 563
2007	1 099	1 956	3 054	2007	1 448	2 388	3 836
2008	1 105	1 960	3 065	2008	1 438	2 380	3 818
2009	1 068	1 844	2 912	2009	1 387	2 248	3 635
2010	1 204	2 065	3 269	2010	1 495	2 445	3 940
2011	1 188	2 205	3 393	2011	1 449	2 576	4 025
2012	1 166	2 341	3 507	2012	1 410	2 706	4 116
2013	1 182	2 581	3 763	2013	1 456	3 014	4 469

Unit: 000'

## Appendix 7 Lisbon: Total Overnights booked on Hotels VS On Total Tourist Lodging Facilities

Source: INE

Lisbon							
Total Overnights booked in Hotels				Total Overnights booked on Tourist Lodging facilities (Hotels and Others)			
Year	Domestic	Foreigners	Total	Year	Domestic	Foreigners	Total
2003	1 324	3 678	5 002	2003	1 852	4 572	6 425
2004	1 389	4 027	5 417	2004	1 944	5 050	6 995
2005	1 508	4 122	5 630	2005	2 127	5 130	7 257
2006	1 714	4 628	6 341	2006	2 381	5 782	8 163
2007	1 863	4 902	6 765	2007	2 517	6 163	8 679
2008	1 849	4 717	6 566	2008	2 503	5 908	8 410
2009	1 748	4 384	6 132	2009	2 393	5 513	7 906
2010	2 017	4 888	6 905	2010	2 623	5 997	8 620
2011	2 018	5 362	7 380	2011	2 588	6 440	9 027
2012	1 973	5 815	7 787	2012	2 475	6 965	9 440
2013	2 018	6 500	8 518	2013	2 554	7 833	10 387

Unit: 000'

## Appendix 8 – Evolution of Number of Hotels in Lisbon

Source: INE

Lisboa						
# Hotels	2009	2010	2011	2012	2013	09-13 Growth
<b>Hotels</b>	<b>146</b>	<b>163</b>	<b>175</b>	<b>192</b>	<b>208</b>	42.47%
5*	21	24	26	26	34	61.90%
4*	60	66	71	76	80	33.33%
3*	47	50	49	51	52	10.64%
2*	18	23	28	35	38	111.11%
1*	0	0	1	4	4	N.A
<b>Others (Pensões, Estalagens, Motéis, etc)</b>	<b>158</b>	<b>150</b>	<b>136</b>	<b>130</b>	<b>119</b>	-24.68%
<b>Total</b>	<b>304</b>	<b>313</b>	<b>311</b>	<b>322</b>	<b>327</b>	<b>7.57%</b>

## Appendix 9 - Evolution of Number of Hotels Rooms in Lisbon

Source: INE

<b>Lisboa</b>						
# Rooms	2009	2010	2011	2012	2013	09-13 Growth
<b>Hotéis</b>	<b>18 583</b>	<b>19 777</b>	<b>20 372</b>	<b>21 158</b>	<b>22 758</b>	22.47%
5*	3 554	4 235	4 460	4 200	5 559	56.42%
4*	9 497	9 484	9 760	10 276	10 532	10.90%
3*	4 309	4 532	4 447	4 519	4 345	0.84%
2*	1 223	1 526	1 682	N.A	N.A	N.A
1*	0	0	23	N.A	N.A	N.A

## Appendix 10 – Evolution of Lisbon's Hotels Occupancy Rate

Source: INE

<b>Lisboa</b>						
Occupancy Rates	2009	2010	2011	2012	2013	09-13 Growth
<b>Hotéis</b>	<b>58.1%</b>	<b>61.1%</b>	<b>62.4%</b>	<b>61.4%</b>	<b>62.7%</b>	7.85%
5*	45.6%	53.0%	57.6%	58.1%	56.0%	22.89%
4*	61.7%	62.8%	64.6%	62.4%	66.0%	7.04%
3*	63.3%	65.4%	64.7%	64.2%	65.5%	N.A
2*	58.4%	61.4%	59.5%	60.4%	62.4%	N.A
1*	N.A	N.A	46.2%	48.7%	48.7%	N.A

## Appendix 11 – Evolution of Lisbon's Hotels Revenue Per Available Room

Source: INE

<b>Lisboa</b>						
RevPar	2009	2010	2011	2012	2013	09-13 Growth
<b>Hotéis</b>	<b>42.5</b>	<b>44.7</b>	<b>46.9</b>	<b>43.5</b>	<b>45.1</b>	6.12%
5*	57.7	63.3	71.0	69.3	69.6	20.62%
4*	41.4	42.5	43.9	40.4	40.1	-3.14%
3*	34.7	35.5	35.2	33.4	35.0	0.86%
2*	32.8	33.5				
1*	0.0	15.1				

Values in €

## Appendix 12 – Altis Grand Hotel\*\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	No	No
Mobile room check-in/check-out	No	No
Free-Wi-Fi	Yes	All rooms
Social network webpages	Yes	Not Chinese webpages
Lobby bar	Yes	
Live music bar	Yes	Occasionally
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	Registered on HotelTonight.com
Special promotions/packages for leisure groups	No	Only Corporate
Special events deals	Yes	
Customized mini-bar offer	No	Only on suits and apartments
Mini-bar with affordable prices (price of beer?)	No	Similar to the lobby bar
Free bottles of Water in all the rooms	No	Only in some of them
Coffee machine in all the rooms	Yes	
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	No
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	Model room tested previously by guests
Theme rooms/personalized rooms	No	No. Only in Altis Belém they have it.
Evolvement with cultural and festival events	Yes	
Scooter rental service	No	They would if there was an existing company
Best prices guaranteed	Yes	
QR code	Yes	In the tour guides
Led Lightening	Yes	
Upon request free tablet / ipad	No	They provide upon request but at a charge
Tablet interfaces/ control systems	No	No
Website compatible with other devices	Yes	
Green causes (how?)	Yes	Hired engineer to promote and control wastes
Solidarity Tourism (how?)	No	No
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	Yes	Basic language and cultural knowledge
Chinese-language TV channels	Yes	
Guide books in mandarin	Yes	
Tea kettles	Yes	Specifically for Chinese guests rooms
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	Yes	

## Appendix 13 – Hotel do Bairro Alto\*\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	No	Yes
Mobile room check-in/check-out	No	Yes
Free-Wi-Fi (1)	Yes	
Social network webpage	Yes	
Lobby bar	No	Yes
Live music bar	Yes	
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers?	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	Yes	
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	No	No
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	No
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	
Theme rooms/personalized rooms	Yes	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	No	
QR code	No	Yes
Led Lightening	Yes	
Upon request free tablet / ipad	No	Yes
Tablet interfaces/ control systems	No	Yes
Website compatible with other devices	Yes	
Green causes (how?)	Yes	
Solidarity Tourism (how?)	No	Yes
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	No
Chinese-language TV channels	No	Yes
Guide books in mandarin	No	Yes
Tea kettles	No	Yes
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	Yes
Acceptance of international cards e.g. China Union Pay	No	Yes

## Appendix 14 – Hotels do Chiado\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	
Mobile Application (mandarin language?)	No	
Mobile room check-in/check-out	No	
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	No	
Live music bar	Yes	
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	Yes	
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	No	
Customer Loyalty programs	No	
Keyless system / (QR code?)	No	
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	
Theme rooms/personalized rooms	No	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	No	
QR code	No	
Led Lightening	Yes	
Upon request free tablet / ipad	No	
Tablet interfaces/ control systems	No	
Website compatible with other devices	Yes	
Green causes (how?)	Yes	
Solidarity Tourism (how?)	Yes	
Local wine and beer tastings events at the hotel	No	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	No	
Guide books in mandarin	No	
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	No	

## Appendix 15 – Hotel Inspira Santa Marta\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	No	Yes
Mobile room check-in/check-out	No	Yes
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	Yes	
Live music bar	No	No
Rooftop bar	No	No
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	Yes	
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	Yes	
Customer Loyalty programs	No	Yes
Keyless system / (QR code?)	Yes	No QR code yet
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	
Theme rooms/personalized rooms	Yes	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	Yes	
QR code	Yes	
Led Lightening	Yes	
Upon request free tablet / ipad	No	No
Tablet interfaces/ control systems	No	No
Website compatible with other devices	Yes	
Green causes (how?)	Yes	Certified Green Leading Hotel Europe 2014
Solidarity Tourism (how?)	Yes	See Blog and Website
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	Yes	
Guide books in mandarin	No	
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	Yes
Acceptance of international cards e.g. China Union Pay	No	



## Appendix 16 – International Design Hotel\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	No	Yes but Not in mandarin for Now
Mobile room check-in/check-out	No	No
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	No	No
Live music bar	No	Sometimes
Rooftop bar	No	No (the building doesn't permit)
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	No	Sometimes on request
Special events deals	No	Sometimes on request
Customized mini-bar offer	No	
Mini-bar with affordable prices (price of beer?)	Yes (€2,50)	
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	Yes	
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	Not soon
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	Through social networks (Facebook and Instagram)
Theme rooms/personalized rooms	Yes	4 different themes, one per floor
Evolvement with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	Yes	On request
QR code	No	Yes
Led Lightening	Yes	
Upon request free tablet / ipad	No	Yes
Tablet interfaces/ control systems	No	Yes
Website compatible with other devices	Yes	
Green causes (how?)	No	Not yet
Solidarity Tourism (how?)	No	Not yet
Local wine and beer tastings events at the hotel	Yes	Wine tasting
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	We have tried but it's Not easy to find
Chinese-language TV channels	No	No
Guide books in mandarin	No	Yes
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	We can prepare it on request
Acceptance of international cards e.g. China Union Pay	No	No

## Appendix 17 – Hotel Memmo Alfama\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	Yes (No)	Yes
Mobile room check-in/check-out	No	Yes
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	Yes	
Live music bar	No	In some special occasions
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	No	Possible on request in near future
Mini-bar with affordable prices (price of beer?)	3,00 €	
Free bottles of Water in all the rooms	No	For repeated guests
Coffee machine in all the rooms	No	In superior rooms and suite
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	
Theme rooms/personalized rooms	No	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	No	
QR code	No	
Led Lightening	Yes	
Upon request free tablet / ipad	No	
Tablet interfaces/ control systems	No	
Website compatible with other devices	Yes	
Green causes (how?)	Yes	Earth check certification in progress
Solidarity Tourism (how?)	No	
Pet-friendly	No	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	No	
Guide books in mandarin	No	
Tea kettles	No	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	No	

## Appendix 18 – Pestana Palace\*\*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	Yes (website)	
Mobile room check-in/check-out	No	No
Free-Wi-Fi	Yes	All rooms
Social network webpages	Yes	Not Chinese Webpages
Lobby bar	No	
Live music bar	Yes	Occasionally
Rooftop bar	No	
Managing reviews (e.g. from Trip Advisor)	Yes	Daily
Special offers	Yes	Specially through social media
Last minute offers	Yes	HotelTonight.com
Special promotions/packages for leisure groups	No	
Special events deals	Yes	
Customized mini-bar offer	Yes	
Mini-bar with affordable prices (price of beer?)	No	Price of pool bar
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	No	Only in superior rooms
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	No
LCD TV	Yes	All rooms
Customer engaging marketing campaigns (how?)	Yes	Personal connection with guests
Theme rooms/personalized rooms	No	No
Evolvement with cultural and festival events	No	No
Best prices guaranteed	Yes	
Scooter rental service	No	No
QR code	No	No
Led Lightening	No	No
Upon request free tablet / ipad	Yes	
Tablet interfaces/ control systems	Yes	
Website compatible with other devices	Yes	
Green causes (how?)	Yes	
Solidarity Tourism (how?)	No	No
Local wine and beer tastings events at the hotel	No	No
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	Perhaps
Chinese-language TV channels	Yes	
Guide books in mandarin	No	Yes
Tea kettles	Yes	Only in superior rooms
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	No	

## Appendix 19 – Hotel Portugal \*\*\*\*

Amenities	Yes/No	If Not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	No	No
Mobile room check-in/check-out	No	No
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	No	No
Live music bar	No	No
Rooftop bar	Yes	In Hotel Mundial
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	No	No
Special events deals	No	No
Customized mini-bar offer	No	No
Mini-bar with affordable prices (price of beer?)	3.50€ (Heineken)	
Free bottles of Water in all the rooms	Yes	At check-in day
Coffee machine in all the rooms	Yes	
Customer Loyalty programs	No	No
Keyless system / (QR code?)	No	No
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	No	No
Theme rooms/personalized rooms	No	No
Evolvement with cultural and festival events	No	No
Best prices guaranteed	Yes	
Scooter rental service	No	
QR code	No	No
Led Lightening	Yes	
Upon request free tablet / ipad	No	Computer at reception
Tablet interfaces/ control systems	No	No
Website compatible with other devices	Yes	
Green causes (how?)	No	No
Solidarity Tourism (how?)	No	No
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	No	
Guide books in mandarin	No	
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	Available at reception
Slippers	Yes	
Chinese breakfast (e.g. rice, Noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	Yes	

## Appendix 20 – Hotel Real Parque\*\*\*\*

Amenities	Yes/No	If not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	No
Mobile Application (mandarin language?)	Yes (no)	
Mobile room check-in/check-out	No	
Free-Wi-Fi	Yes	All rooms and public spaces
Social network webpages	Yes	Not in Chinese social webpages
Lobby bar	Yes	And sports bar
Live music bar	No	No
Rooftop bar	No	No
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	Early bookings and last minute
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	No	Yes
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	No	No
Coffee machine in all the rooms	No (suits only)	No
Customer Loyalty programs	Yes	Real VIP
Keyless system / (QR code?)	No	No
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	On social networks
Theme rooms/personalized rooms	No	No
Evolverment with cultural and festival events	No	Yes - Underdevelopment
Best prices guaranteed	Yes	
Scooter rental service	No	Not directly in the hotel
QR code	Yes	On Sports Bar card
Led Lightening	Yes	
Upon request free tablet / ipad	No	No
Tablet interfaces/ control systems	No	No
Website compatible with other devices	Yes	
Green causes (how?)	Yes	
Solidarity Tourism (how?)	No	Perhaps
Local wine and beer tastings events at the hotel	No	Only in Real Palácio
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	Yes
Chinese-language TV channels	No	Yes
Guide books in mandarin	No	Yes
Tea kettles	No	Yes
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	No	Yes

## Appendix 21 - Hotel The Vintage House Lisboa\*\*\*\*\*

Amenities	Yes/No	If not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	
Mobile Application (mandarin language?)	No	
Mobile room check-in/check-out	No	
Free-Wi-Fi	Yes	
Social network webpages	Yes	
Lobby bar	Yes	
Live music bar	No	
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	No	
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	Yes	
Coffee machine in all the rooms	No	
Customer Loyalty programs	No	
Keyless system / (QR code?)	No	
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	No	
Theme rooms/personalized rooms	No	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	No	
QR code	No	
Led Lightening	Yes	
Upon request free tablet / ipad	No	
Tablet interfaces/ control systems	No	
Website compatible with other devices	Yes	
Green causes (how?)	Yes	
Solidarity Tourism (how?)	No	
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	No	
Guide books in mandarin	No	
Tea kettles	No	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	Yes	

## Appendix 22 - Hotel Tivoli Jardim Lisboa\*\*\*\*

Amenities	Yes/No	If not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	
Mobile Application (mandarin language?)	No	
Mobile room check-in/check-out	No	
Free-Wi-Fi	No	Yes
Social network webpages	Yes	
Lobby bar	Yes	
Live music bar	Yes	
Rooftop bar	Yes	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	Yes	
Mini-bar with affordable prices (price of beer?)	Yes	
Free bottles of Water in all the rooms	No	No
Coffee machine in all the rooms	Yes	
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	Yes	
Theme rooms/personalized rooms	No	
Evolverment with cultural and festival events	Yes	
Best prices guaranteed	No	
Scooter rental service	No	
QR code	No	
Led Lightening	No	
Upon request free tablet / ipad	No	
Tablet interfaces/ control systems	No	
Website compatible with other devices	Yes	
Green causes (how?)	No	Yes
Solidarity Tourism (how?)	No	Yes
Local wine and beer tastings events at the hotel	Yes	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	Yes	
Chinese-language TV channels	No	Yes
Guide books in mandarin	No	Yes
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, noodles, congee)	No	On request
Acceptance of international cards e.g. China Union Pay	Yes	

## Appendix 23 - Hotel Dom Pedro\*\*\*\*\*

Amenities	Yes/No	If not, are you planning to implement it?
<b>Millennial travellers oriented solutions</b>		
Check-in Kiosks	No	
Mobile Application (mandarin language?)	No	
Mobile room check-in/check-out	No	
Free-Wi-Fi	No	Suites and Tower Rooms
Social network webpages	Yes	
Lobby bar	Yes	
Live music bar	No	
Rooftop bar	No	
Managing reviews (e.g. from Trip Advisor)	Yes	
Special offers	Yes	
Last minute offers	Yes	
Special promotions/packages for leisure groups	Yes	
Special events deals	Yes	
Customized mini-bar offer	No	
Mini-bar with affordable prices (price of beer?)	Price of beer: € 5.00	
Free bottles of Water in all the rooms	No	
Coffee machine in all the rooms	No	Suites and Tower Rooms
Customer Loyalty programs	Yes	
Keyless system / (QR code?)	No	
LCD TV	Yes	
Customer engaging marketing campaigns (how?)	No	
Theme rooms/personalized rooms	No	
Evolvement with cultural and festival events	Yes	
Best prices guaranteed	Yes	
Scooter rental service	Yes	
QR code	No	
Led Lightening	Yes	
Upon request free tablet / ipad	No	
Tablet interfaces/ control systems	No	
Website compatible with other devices	Yes	
Green causes (how?)	Yes	Reusing towels during the stay
Solidarity Tourism (how?)	No	
Local wine and beer tastings events at the hotel	No	
<b>Chinese travellers' oriented solutions</b>		
Mandarin Chinese speaking staff	No	
Chinese-language TV channels	No	
Guide books in mandarin	No	
Tea kettles	Yes	
Shave cream, razors and toothbrushes	Yes	
Slippers	Yes	
Chinese breakfast (e.g. rice, noodles, congee)	No	
Acceptance of international cards e.g. China Union Pay	Yes	



## Appendix 24 – Top 10 Chinese-specific products or services that are most important on an international trip

Source: Hotels.com, (2014). The Chinese International Travel Monitor 2014

